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## OFFICE OF PUBLIC INSTRUCTION

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Linda McCulloch  
Superintendent

August 12, 2002

### Invitation for Professional Consulting Service Proposals

The Montana Office of Public Instruction (OPI) is seeking consultants or service organizations to provide regional technical assistance to district teams in the completion and timely submittal of the Five-Year Comprehensive Education Plan required by ARM 10.55.601.

#### Services Include

1. Contacting potential participants from school systems in a given service area and encouraging them to participate in a series of Five-Year Comprehensive Education Plan training sessions.
2. Arranging facilities and materials for above training.
3. Providing regional workshop series of 12 hours for district planning teams in order to:
  - a. Complete an acceptable Five-Year Comprehensive Education Plan as required by ARM 10.55.601 and related state and federal program planning guidelines.
  - b. Understand the foundations of collaborative data-driven decision making.
  - c. Submit an acceptable Five-Year Comprehensive Education Plan to OPI by May 1, 2003.
4. Reporting activities, evaluation results, and participant roster to OPI staff and prepare participant documents for receiving recertification renewal units.

Each regional workshop series will be 12 hours, in any configuration of training sessions (i.e., four three-hour sessions). Services for each workshop series should not exceed a total of 27 hours for on site, travel, and planning time. Each session will likely have between five and 12 teams. It is anticipated that district teams will consist of two to four district staff.

Regional independent contractors (or groups of consultants in an organization) may apply to carry out training of one or more 12-hour workshop series. The contractor shall not assign, transfer or subcontract any portion of the contract without the express written consent of the OPI (detailed in letter of agreement).

#### Additional Requirements

Each regional trainer will be required to attend a two-day training and planning session with Dr. Victoria Bernhardt and OPI staff in Helena, Montana on October 8-9, 2002, or will have attended the American Productivity and Quality Centers (APQC) ADAPTS training in Havre, Montana August 14-16, 2002 and be available for planning via conference call prior to October 8, 2002.

Each regional trainer will be required to attend three follow-up conference calls or on-line conferences.

#### Timeline

Services will be provided between October 10, 2002, and April 30, 2003. Timelines for regional training will be at the discretion of the trainer. It is strongly advised that one training session be held at or near a local METNET site on December 3, 2002. Dr. Victoria Bernhardt will be a guest lecturer speaking about quality planning through multiple measures. The OPI will pay for the cost of Dr. Bernhardt's services and the METNET Video Site fees but will not include additional training room fees.

*"It is our mission to advocate, communicate, educate and be accountable to those we serve."*

## **Invitation for Professional Consulting Service Proposals**

### **Proposals Should be Based on the Following**

Regional trainers will be compensated on an hourly basis, not to exceed a total of 27 hours for planning and presentation per workshop series. Each regional workshop series will be 12 hours in length.

An additional **\$50** follow-up fee will be paid to regional trainers or organizations for **each** district team on the consultant's training roster that returns a completed Five-Year Comprehensive Education Plan to the OPI on or before May 1, 2003.

All expenses, including travel, lodging, equipment, and materials shall be the responsibility of the independent contractor or service organization. Hourly compensation includes indirect (administrative) costs. A per participant fee may be collected by the consultant to cover **only** the cost of the site, and participant meals and snacks (optional).

### **Limitation of Scope of Training**

Regional consultants and organizations may contract to provide services for up to 12 workshop series (not to exceed \$24,000 in total compensation).

Providing individual facilitation or profiling services to districts is not within the scope of this agreement. Regional consultants may, at the request of individual districts, provide consulting and profiling services to individual districts under a separate agreement. The OPI is not responsible for agreements between consultants or organizations and individual districts.

### **Written Offers Must Include the Following Elements**

1. Applicant's full name, mailing address, e-mail address, and telephone number.
2. Total number of hours (on site hours and preparation time) projected for each workshop series.
3. Hourly compensation (not including follow-up fee).
4. Number of 12-hour workshop series to be provided under this agreement (one to twelve).
5. Preferred region(s) and county(s) within region(s) (see attached map).
6. A description of educational background and district planning experiences.
7. A description of the content and training methods the consultant or organization plans to implement. (Resources available on the OPI Website under "5-year Comprehensive Education Plan" and "Data Strategies").
8. Two letters of references describing the consultant or organization's knowledge of school improvement and presentation/facilitation skills.
9. Independent contractor's license or verification of worker's compensation coverage.

### **Deadline for Independent Contractor or Service Organization Proposals:**

Postmarked no later than, Friday, September 6, 2002.

### **Deadline for Questions:**

August 30, 2002

<b>Send Professional Services Proposals to:</b> Christine Provance OPI PO Box 202501 Helena, MT 59620	<b>Direct all questions to:</b> Christine Provance Planning and Evaluation Specialist (406) 444-4436 or <a href="mailto:cprovance@state.mt.us">cprovance@state.mt.us</a> All questions will be posted on the "5-Year Comprehensive Education Plan" Website on or before September 2, 2002.
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**Five-Year Comprehensive Education Plan  
Professional Services Proposal  
Timeline**

Deadline for questions to OPI.	August 30, 2002
All questions and answers about proposals will be posted on OPI website.	September 2, 2002
All proposals must be postmarked	September 6, 2002
Proposals will be opened and prepared for selection.	September 9, 2002
OPI and district staff team will evaluate and select independent contractors.	September 11, 2002
Notification to applicants.	September 17, 2002
Letters of agreements to selected contractors.	September 20, 2002
Letters of agreement due to OPI.	September 27, 2002

**Selection Rubric**

**Elements of the proposal will be based on the following rubric. Proposals that do not include the 8 elements listed in the Invitation will not be considered.**

Weight	Proposal Element	Acceptable	Not Acceptable
15%	<b>Total Cost Per Workshop Series:</b> Total number of projected hours per workshop series multiplied by the hourly compensation requested.	\$1620.00 per series (i.e. 27 hours x \$60 per hour) Do not including follow-up fee.	Over \$1620.00 per series Not including follow-up fee.
40%	<b>Educational background and experience.</b>	A bachelor's degree in education and at least 3 years experience related to school/district planning.	No degree in education and/or less than 3 years experience related to school/district planning.
40%	<b>Description of Training Methods</b>	An understanding of ARM 10.55.601 and data-driven school improvement are evident. Methods described show understanding of adult learners.	Description of training does not demonstrate an understanding of ARM 10.55.601, school improvement and/or best practices in teaching adult learners.
5%	<b>Distance from consultant's residence to preferred area</b>	Regional area identified. See note below.	

**Please Note:**

When more than one acceptable proposal is submitted for the same area, selection will be based first upon total cost and second upon the distance from the consultant's residence to preferred area. In the event described above, discussions about serving a different service area (e.g. travel costs) may be conducted with the applicants.

# **MONTANA PROFESSIONAL DEVELOPMENT REGIONS**

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